Job Aid:
How to Create an RPA Release Requisition

This Job Aid Shows How To:

- Create an RPA Release Requisition in COMMBUYS.

Of Special Note:

What are RPA Release Requisitions and When Are They Appropriate?
The Operational Services Division has numerous Statewide Contracts that allow buyers to record contract purchases in COMMBUYS **after** the purchase has been made. These COMMBUYS Statewide Contract transactions are called RPA Release Requisitions. They are appropriate in circumstances where the normal COMMBUYS Statewide Contract Purchase Order process is not possible. Examples of these include:

- Situations where the final purchase price is not known until receipt of an invoice. For example: purchase of propane (ENE46), staff augmentation (ITS63) or network services (ITT46), among others; or
- Unanticipated circumstances, such as replacement of a flat tire (VEH97) or windshield (VEH103).

NOTE: that because these transactions already have taken place, the RPA Release Requisition will not result in a PO being sent to the vendor.

Contract User Guides indicate whether a contract accommodates RPA Release Requisition functionality and any limitations. Buyers also may find a list of RPA-enabled contracts using the *Expanded Search* in the Statewide Contract Index. Find Contract User Guides, the Statewide Contract Index, and Index instructions at mass.gov/osd > Search: Buy from a Statewide Contract.

NOTE: RPA Requisitions (as opposed to RPA *Release* Requisitions) in COMMBUYS record *off-contract* purchases when the normal procurement process is impractical due to impending need (emergency purchases) and for one-time incidental purchases up to $10,000. Locate the *How to Create an RPA Requisition Job Aid* at mass.gov/osd.

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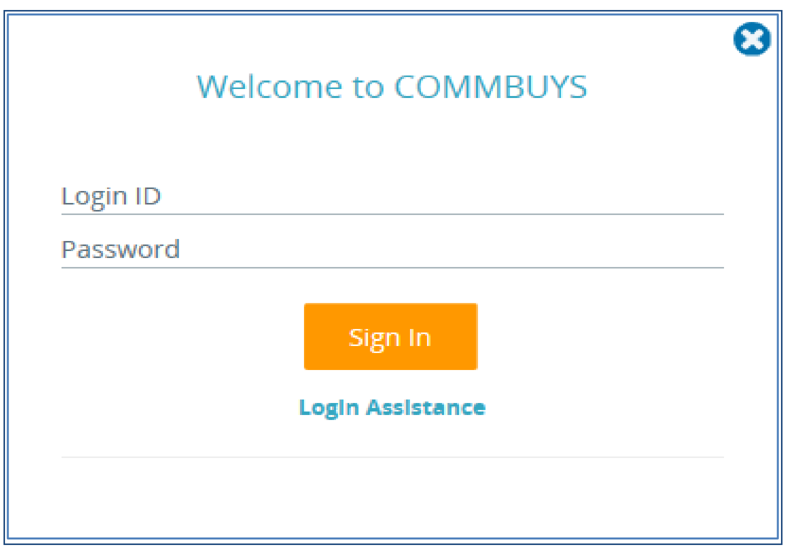
Screenshot	Directions



Step 1: Accessing the COMMBUYS Landing Page

1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking on the hyperlink [COMMBUYS.](https://www.commbuys.com)
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your Login ID and Password and click on the **Sign In** button.

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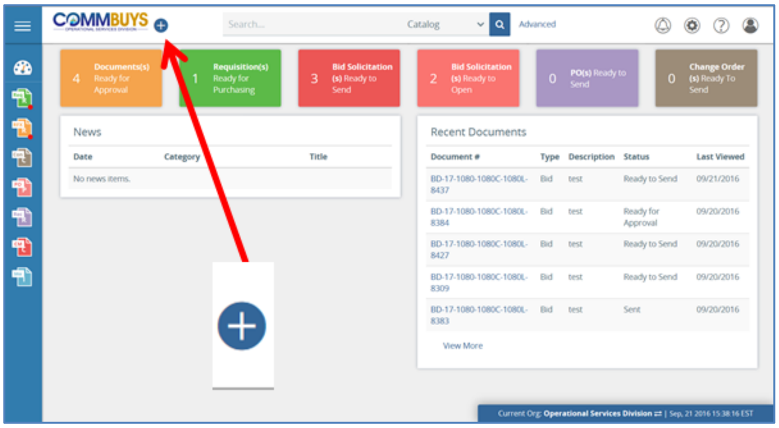
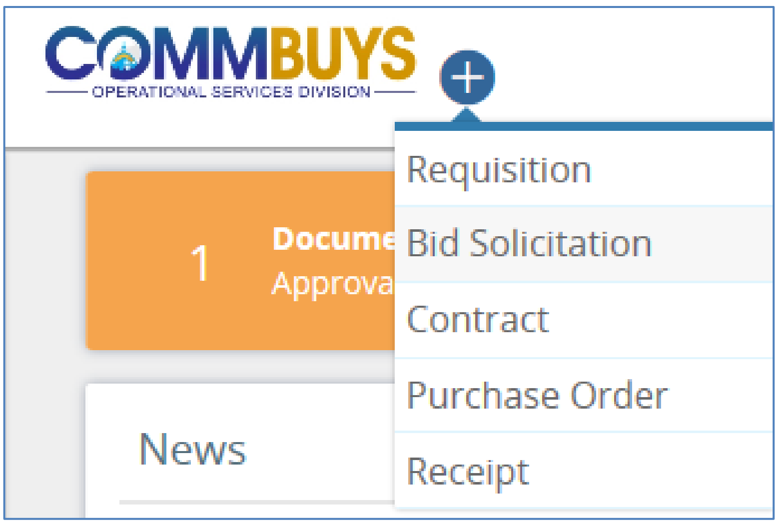
Step 2: Creating a New Document



1. Click on the **Add Documents** (plus sign) icon.



2. Select **Requisition** from the dropdown menu.

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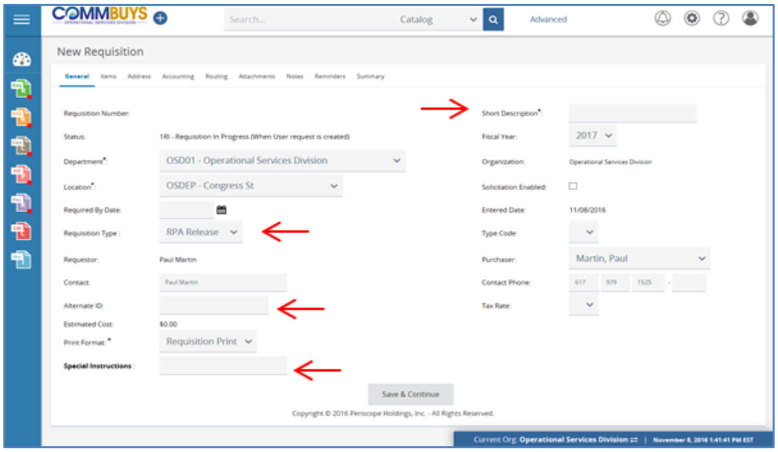


Step 3: Entering Data in the General Tab

The General tab page displays. Fields with asterisks are required fields. The required fields for Department, Location, and Print Format default to values that may be changed if needed.

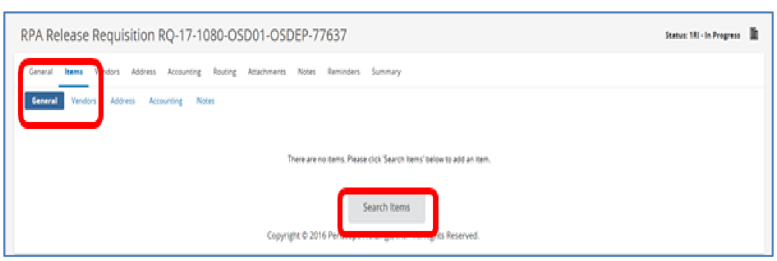
1. In the required Short Description field enter a searchable description of the desired goods or services.

2. Click on the dropdown arrow next to the Requisition Type field and select **RPA Release** (do NOT select RPA).

3. Alternate ID: Enter information as required. This may include (but not limited to) data such as MMARS encumbrance ID or ERP/Accounting system transaction numbers for non-MMARS users.

4. Special Instructions: Enter information as required. This field normally allows for entry of specific instructions to vendors. If entered on the requisition, the data in this field will copy forward to the PO and also be visible on the print version of the PO. Since this PO will not be sent to the vendor, it may be used for additional information about this RPA.

5. When you are finished, click on the **Save and Continue** button.



Step 4: Searching for Items

1. Click on the **Items** tab.
2. Click on the **Search Items** button.

OPERATIONAL SERVICES DIVISION

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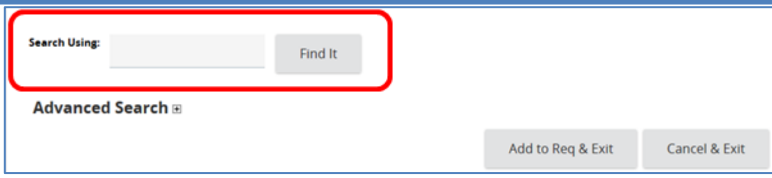

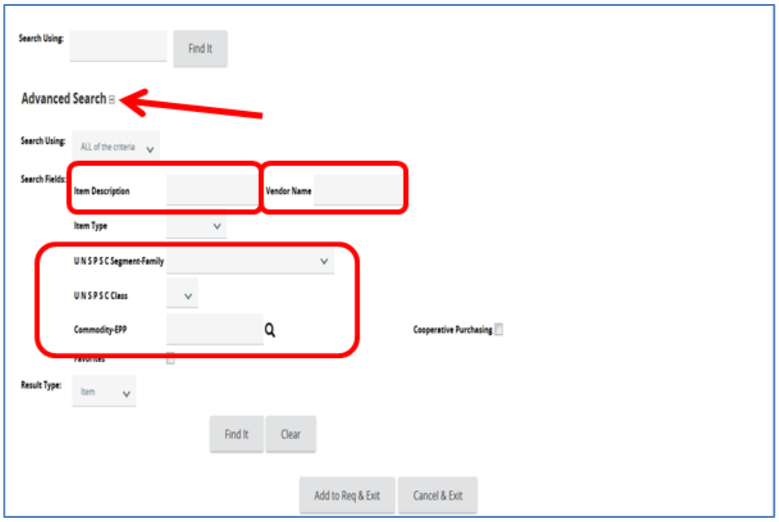

Step 5: Conducting an Item Search

1. Enter the name of the item in the **Search Using** field.
2. Click on the **Find It** button.

A preferred alternate search method would be to click on the plus sign icon next to **Advanced Search** .

A popup screen allows you to search by Item Description, Vendor Name, and UNSPSC code.

Step 6 : Selecting the Item

1. Click the checkbox next to the desired item in the left **Select** column.
2. Enter the item quantity in the **Quantity** column.

To add other items from other pages, click on the **Add to Req & Next Page** button; otherwise click on the **Add to Req & Exit** button.

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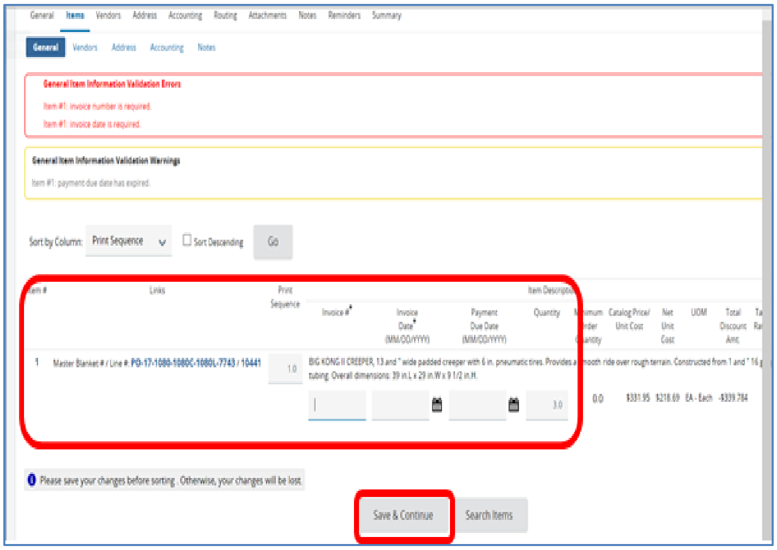
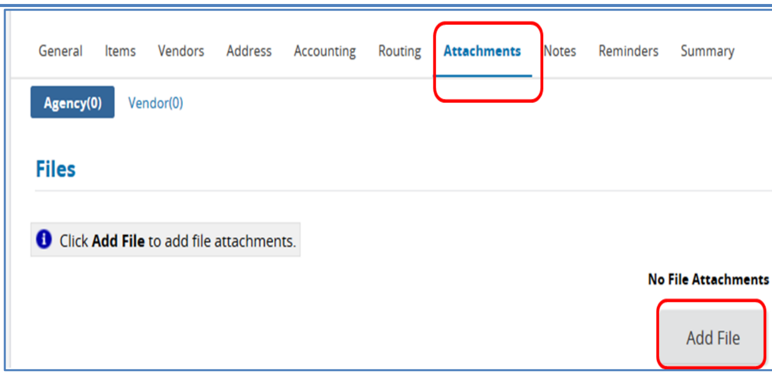


Step 7: Entering the Invoice Data

1. Enter the invoice number in the **Invoice #** field.
2. Enter the **Invoice Date** and **Payment Due Dates** into the respective fields.
3. Click on the **Save & Continue** button.

NOTE: If a selected item has a zero dollar amount, you will be prompted to enter the item amount from the invoice.



Step 8: Attaching Documents

As an option, the Attachments tab page may be used to add documents such as invoices, emails, quotes, etc.

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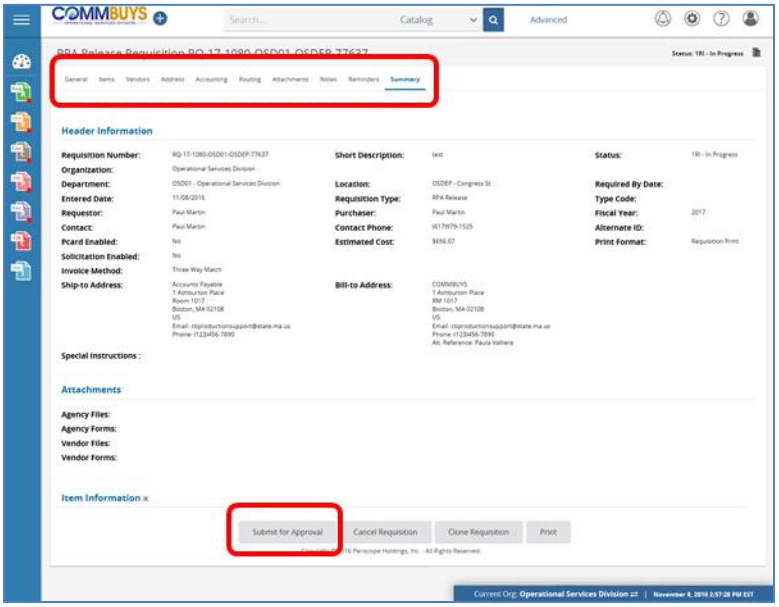


Step 9: Submitting for Approval

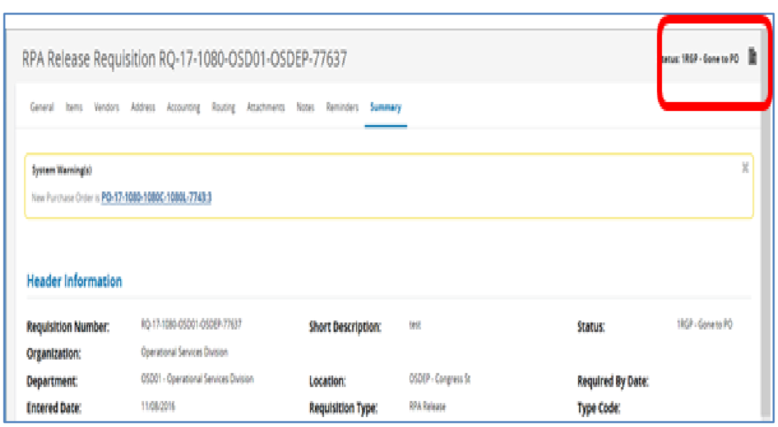
1. Verify the information contained in each tab for accuracy.

2. Click on the **Summary** tab, validate the information, then click on the **Submit for Approval** button.

Step 10: Saving the Approval

The approval path will display or you're given the option to select the appropriate one. Click the **Save & Continue** button to complete.

NOTE: The RPA Release requisition will now proceed through your department's approval path (**no image is provided here as approval paths will vary**). You will be informed by COMMBUYS email when the approval is complete.



Step 11: Requisition has Gone to PO

After approval, the Summary tab of the RPA Release requisition will have the status of **Gone to PO**.

The purchase order for the RPA Release will have the status of **Complete Receipt**. To verify this, click on the blue hyperlink of the PO.

NOTE: The vendor will not receive this PO.